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Langley Research Center

PLANNING AND DOCUMENTING THE TECHNICAL CONFERENCE

National Aeronautics and Space Administration

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Langley Research Center
DIRECTIVES MANAGEMENT
TRANSMITTAL SHEET

LAPG 2220.1

March 6, 2003

MATERIAL TRANSMITTED

LAPG 2220.1, “Planning and Documenting the Technical Conference.”

RECISION

LAPG 2220.1, dated May 23, 2002.

SUMMARY

This directive has been revised to update references. The change is a minor change. According to LMS-CP-2701, “LaRC Directives Initiation, Review, and Approval,” a review and approval cycle is not required.

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FOREWORD

> *"It is the province of knowledge to speak*
> *and it is the privilege of wisdom to listen."*
>
> OLIVER WENDELL HOLMES

The National Aeronautics and Space Act of 1958 established a clear mandate for Langley Research Center (LaRC) to ". . . provide for the widest practicable and appropriate dissemination of the information concerning its activities and the results thereof."

The technical conference has proven to be a most effective form of information transfer not only for the conference attendees traveling from afar, but for the LaRC staff as well. In our aerospace world of technical specialization, there exists a wealth of segmented knowledge which offers limitless opportunities for rewarding interchange. The technical conference, by providing a forum for identification and open discussion of problems of concern, becomes a catalyst for their early solution. In the process, the horizon of the specialist may be expanded to encompass challenging new areas not yet envisioned. Prompt publication of the proceedings as a reference document extends the technical impact far beyond the confines of conference walls.

The organization and conduct of a major conference is an LaRC activity second only in importance to the conduct of research itself. The substantial expenditure of resources in terms of time, effort, money, and energy demands a high level of management expertise and personal dedication. The goal is a carefully planned and executed conference in the best traditions of the Langley Research Center.

PREFACE

Planning and documenting a major technical conference is a formidable task for an experienced conference organizer. For the inexperienced, the course of events may well be overwhelming. Herbert Kindler's book, "Organizing the Technical Conference," addresses the dilemma by noting:

"All conferences have one problem in common: they require action so far in advance of the actual meeting that the conference planners cannot afford to learn as they go along."

This handbook, hereinafter referred to as "Conference Handbook," has been prepared to address the full scope of conference organization. It proceeds step-by-step from the preliminary planning stage through conference organization and execution and finally to the publication of the conference proceedings.

Emphasis in the Conference Handbook has been placed on the organization and execution of the technical aspects of the conference. Experience has shown that inadequate planning can adversely affect not only the technical impact of the conference but also the quality and efficiency of the supporting services as well. Conference support services are available through the Public Services Program Contract monitored by the Office of Public Services, Office of External Affairs.

The Conference Handbook will assist the inexperienced and the experienced conference organizer. Included are checklists of schedules and events, examples of key documents, and the identification and access to conference support services.

The Conference Handbook has been prepared by the Office of Public Services with support from various LaRC organizations. Comments and suggestions for revisions should be directed to the Office of Public Services. Copies of the Conference Handbook are available from the Office of Public Services and the Office of Logistics Management.

This handbook cancels Supplement A to LHB 2220.5, dated July 1996.

Lana M. Couch
Associate Director for
  Business Management

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Chapter 1

INTRODUCTION

FOCUS OF THE CONFERENCE HANDBOOK

The size and technical scope of a conference will determine which elements of the Conference Handbook will be used. The needs of a typical 1- to 2-day conference of 200 to 300 attendees have been used as the focus for this Conference Handbook. However, for the 1-day workshop with fewer than 25 attendees, a more modest planning effort will be required. The Conference Handbook outlines the various steps and procedures sequentially from the time of initial planning of the conference to the transmittal of the conference proceedings and post-conference evaluation.

TYPES OF MEETINGS (TERMINOLOGY)

The terminology for distinguishing various types of meetings is not precise. Therefore the conference organizer may exercise a degree of personal preference in selecting a descriptive meeting name. Within the Conference Handbook, the term “conference” will be used collectively to encompass the entire spectrum of meetings to be considered. The following terminology, taken from dictionary definitions and references on conference planning and from a consensus of conference planners, should be helpful.

Conference

An organized meeting wherein formal papers are presented for information transfer and as a basis for discussion. A “conference” tends to be large in attendance and the subject under discussion broad in scope. The word “conference” is generally accepted as a collective term for all types of formal meetings.

Symposium

A presentation of prepared addresses by individuals or panels on a topic that is generally restricted in scope and highlighted by audience participation. “Symposium” is the most classical of terminology. It implies a scientific or academic content and a commitment to publish the proceedings.

Workshop

A directed group participation usually stimulated by brief, prepared addresses. “Workshop” implies a shirt-sleeve type environment aimed at the accomplishment of an end product or objective by the close of the session. The participants are the resources.

Forum

A program involving the discussion of a problem or current topic usually by several invited authorities constituting a panel under the direction of a moderator. Audience participation is not unusual and takes place upon invitation of the moderator. A “roundtable” is a forum-type meeting of limited scope.

Seminar

A small classroom-like meeting for advanced study under the guidance of an eminent panel or recognized leader. It is characterized by a free exchange of results through informal lectures and open discussion.

Clinic

An organized presentation for participants who are usually in a trainee role. The demonstration of equipment for “hands-on” use may be a key element.

ABBREVIATIONS

See Appendix H for a “List of Abbreviations” used in this Conference Handbook.

ANNOTATED BIBLIOGRAPHY

See Appendix I for the “Annotated Bibliography.”

PHASES OF CONFERENCE PLANNING

For planning purposes, the organization of the conference may be grouped into four sequential phases:

Phase I - Preliminary Planning and Approval

This phase covers the time period from the initial concept of the conference and preliminary documentation to the signature approval by the Senior Scientist, Office of the Director.

Phase II - Conference Organization

Preliminary planning is expanded into an organized program embracing all aspects of the total conference including the technical organization, publication plan, and support services. It covers the time span from the end of Phase I--Preliminary Planning and Approval--to a few days immediately prior to the conference.

Phase III--Conduct of Conference

This phase covers the “on-site” activities during the conference and the time periods immediately preceding and following the conference.

Phase IV--Post Conference

This phase covers post conference technical activities: publication of the conference proceedings and the post-conference assessment.

AREAS WITHIN EACH PHASE

Within each of the four phases of conference planning, the flow of effort can be grouped into three basic areas, each largely independent, yet closely interrelated.

Technical Organization

Responsibility for the technical content of the conference rests with the sponsoring LaRC organization as implemented by the conference chairperson and staff. Coordination and execution of the technical program, utilization of the support services, and publication of the conference proceedings are, to a degree, a shared responsibility. In the final assessment, however, the sponsoring organization has full responsibility for all areas of conference organization.

Administrative and Logistic Support

- NASA Langley Research Center (LaRC) has a substantial array of support services available to the conference organizer upon request. The LaRC Conference Manager, Office of Public Services (OPS), Office of External Affairs (OEA), is responsible for the general logistic support of a conference, such as site reservation, motel/hotel liaison, meeting refreshments, and management of registration fees. Conference support services are also available through the Public Services Program Contract monitored by the OPS. The Conference Manager should be contacted to discuss these services.

- Conference organizers should be aware that there are special rules and regulations that apply to the expenditure of appropriated and non-appropriated funds to procure facilities, food, refreshments and other goods and services in support of conference events. Typically, the provision of special items such as food and refreshments at government expense is not allowed, but there are exceptions. Organizations are encouraged to consult with the Conference Manager, the Chief Counsel and/or the Chief Financial Officer for guidance. There are serious implications for both LaRC and the employee if an unauthorized expenditure occurs.

- OCIO, Media Services Center, provides conference related services such as photographic, graphics, printing, and part of the audio/video recording. Other LaRC offices provide support services in the areas of site security, special contract services, and so forth.

Documentation

The OCIO, Media Services Center, in addition to its role in the area of administrative and logistic support, has sole responsibility for the graphics and layout, printing, and distribution of the conference proceedings. OCIO, Media Services Center, is responsible for compliance with all applicable NASA and Federal regulations associated with publication of a government document, including security classification and restricted programs.

PHASE I--PRELIMINARY PLANNING AND APPROVAL

GENERAL

Phase I spans the time period from the initial concept of the conference through the various steps to formal approval by the Director through the Senior Scientist. Until written approval is received, no formal commitments as to conference date, site, or staffing can be made. Because lead time is so crucial, considerable general planning must be accomplished in Phase I--**but with all commitments on hold**.

For the inexperienced conference planner, Phase I is a difficult and critical period, for major decisions must be made which require knowledge of the overall conference planning process. Further, the process of planning at this stage can be very confusing because all areas are highly interdependent, yet no firm decisions can be made upon which to build an orderly plan. The following sections address the necessary steps to be taken in Phase I in the basic areas of Technical Organization, Administrative and Logistic Support, and Documentation.

TECHNICAL ORGANIZATION

Technical planning at this stage is aimed at defining the technical scope of the conference, the level of participation, and the general organization to a degree sufficient for approval by the Director through the Senior Scientist. This requires organization of a staff and establishment of a technical theme, conference format, and planning schedule. Documentation plans, as they affect the schedule, must also be considered.

Conference Staff

During Phase I the working staff can consist of only one person. The key member should be an experienced organizer having a broad technical background applicable to the conference theme. With a one-member organization, however, plans must be in place to expand the staff as required immediately upon receipt of conference approval. Further considerations of conference staffing are presented in Chapter 3, “Phase II--Conference Organization.”

Conference Name and Sponsor

Select a type of meeting (see Chapter 1, "Introduction”).

Joint sponsorship can broaden the technical base and expand the potential attendance. Definition of the roles and responsibilities of the sponsoring organizations, however, is a difficult task.

General Planning Considerations

Conference Session Format

The summary of meeting types outlined in Chapter 1 provides a selection to best meet the conference objectives. In a major conference, the planner has the option to use the type of meeting, within the conference framework, to best meet the objectives.

Conference Papers

The necessity for determining conference lead times requires an early decision as to how conference papers will be solicited. “Invited” papers, which are specified as to content, require shorter lead times than “contributed” papers, where delays in reviewing abstracts and in evolving a coherent technical session are substantial.

ADMINISTRATIVE AND LOGISTIC SUPPORT

At this stage of conference planning, the main thrusts in the conference support area (subject to receipt of conference approval) are three-fold as follows:

- Establish a conference date.
- Select a conference site.
- Initiate reservations for a block of motel/hotel rooms through OPS.

Establish a Conference Date

Lead Time Involved

- Selecting a conference date is a difficult compromise between the pressures for an early conference versus the requirements for relatively long lead times for orderly planning--for the participants **and** the conference organizers. Typical lead times--from the start of preliminary planning (Phase I) to the date of the conference (Phase III)--may range from15 months down to 2 months depending on the type of conference and the stage at which the published proceedings are distributed.

- Based on LaRC experience, Appendix A presents a summary of typical planning lead times for various types of conferences and their attendant documentation plans. Shorter lead times than those noted should be attempted only by experienced conference planners.

Check for Schedule Conflicts

The setting of the actual conference date is an iterative process between the tentative date, desired site availability, and conflicts with other competing conferences and events. The services of OPS can be invaluable in this determination. For an LaRC conference in the aerospace area, schedule conflicts with the following organizations should be investigated:

Within NASA:

- Organizational calendars
- LaRC Senior Staff Calendar (approximately 3 months lead time)

- NASA Events Calendar (includes other Centers)*
- NASA Advisory Councils, Committees, and Subcommittee Calendars*

*Available on e-mail from the Office of Director to all senior staff secretaries.

External to NASA:

- Cognizant government organizations
- Related technical societies
- American Institute of Aeronautics and Astronautics (AIAA) (see calendar in Aerospace America)
- Aviation Week and Space Technology (aerospace events calendar)

Check for Other Conflicts

Dates to Avoid:

- Legal and religious holidays, election days, and October through mid-November (because of possible travel funding problems if NASA is under a Continuing Resolution or is shut down, as experienced in 1990).
- Dates requiring the attendees to travel on weekends or holidays.
- Periods of local congestion when accommodations are limited. (The Peninsula Chamber of Commerce is a source of information.)

Check for Other Considerations

- If substantial attendance from the academic community is anticipated, consider scheduling the conference during vacation periods, semester breaks, and so forth.

- When two conferences with complementary technical themes are scheduled in the same geographic area, consideration should be given to holding the conferences in sequence to facilitate attendance at both conferences.

Select a Conference Site

At LaRC H.J.E. Reid Conference Center

The H.J.E. Reid Conference Center, 14 Langley Boulevard (Facility 1222), is the primary choice for large conferences (up to 500 attendees). Employees may access floor plan through Langley's internal @LaRC website, "Find a building or room." Information on audio/visual equipment and side meeting rooms is given in Appendix C. The LaRC Conference Manager is responsible for facility reservations and on-site arrangements. The availability of professional managerial support and excellent audio/visual and electronic recording facilities makes the H.J.E. Reid Conference Center a logical first choice for a conference site.

Other LaRC Sites

Appendix C also lists other currently available auditoriums and meeting rooms noting the seating capacity, audio/visual equipment in place, and the LaRC telephone extension for reservations. The Conference Manager is prepared to make all LaRC site reservations.

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IMPORTANT: Approval of the LaRC Security Officer (Head, Office of Security and Public Services, Office of Safety, Environment and Mission Assurance (OSEMA)) is required for all classified conferences. **Classified conferences (or sessions) are to be held at LaRC.**

Off-Center Sites

Local (within the area of LaRC logistic support)

When LaRC facilities are not adequate or available to host the subject conference, off-Center conference sites in the Tidewater area should be investigated. The Conference Manager maintains a file of major facilities in the Norfolk, Peninsula, and Williamsburg areas and can assist with the planning of off-Center conferences. Classified conferences sponsored by LaRC are **not** to be held outside the Center.

NOTE: Conferences held in the Hampton/Newport News area do not require official travel orders; therefore, attendance at such conferences will not qualify for per diem.

Nonlocal (beyond LaRC logistic support)

Nonlocal might include other NASA Centers, universities, contractor in-house facilities, or commercial conference sites. Such sites present special problems which must be carefully considered.

Initiate Reservations

Conference Site Reservations

Any decision as to site must be tentative pending receipt of conference approval. **Site reservations should be made, however, subject to later verification.** The Conference Manager can assist in this area.

Motel/Hotel Block Reservations

For a conference having off-Center attendees, contact the Center's Conference Manager for guidance regarding motel/hotel rates and related information. It is advisable to request a block of rooms, which allows lower rates, facilitates group transportation (by carpool or special buses) to the Center and social functions, and fosters communication among participants.

The services of the Conference Manager can be invaluable in this area.

LETTER OF REQUEST FOR CONFERENCE APPROVAL

Initiation and Transmittal

A letter of request for conference approval addressed to the LaRC Director through the Senior Scientist should be prepared and transmitted through official channels. **Information copies should also be sent to the OCIO, Media Services Center, and to the Office of External Affairs (OEA).** It must be remembered that only the Office of the Director can commit the Langley Research Center to sponsor or cosponsor a conference.

Conditions Requiring a Letter of Request

Not all conferences will require the preparation of a letter of request. In-house conferences of NASA personnel requiring minimal support services would be excluded regardless of size. Small discussion-type meetings or workshops (even if they include non-NASA personnel) would not require a letter of request if the resources of the sponsoring organization are adequate to handle the event. However, the organization's upper management should be informed.

A letter of request should be prepared if the resources of LaRC committed to the conference are substantial, or if the reputation of LaRC by virtue of its sponsorship is at stake. The following additional conditions require a letter of request:

- The proceedings of the conference will be documented and published.
- The conference is cosponsored with a non-LaRC organization.
- The subject matter is either classified or of a sensitive nature.
- Very important persons (VIP's) and/or foreign nationals will be in attendance.

Content of Letter of Request

The letter of request is preliminary in nature and represents a first cut at total conference planning. It should provide an estimate of the scope of the conference in sufficient detail to provide a basis for approval from the Senior Scientist. Expenditure of effort at this stage should be held to a minimum until conference approval has been reached. (See Appendix G, "Conference Kit.")

The letter of request is to include:

- Name of conference
- Date and location
- LaRC sponsor and point of contact (note cosponsors, if any)
- Attendees (number and source, including anticipated attendance by foreign nationals)
- Type of conference
- Agenda and objectives
- Publication plans
- Security classification
- Restricted category if applicable
- Administrative and logistic support (note unusual requirements)
- Conference staff (chairperson, et al.)
- Procurement plan
- Cognizant NASA Headquarters Office
- Supplementary information
- Key contacts made
- Site and motel/hotel reservations
- Commitments

Routing of Letter of Request

The letter of request should be routed through official channels to the Director through the Senior Scientist with information copies to the following:

- OEA
- OCIO, Media Services Center
- Office of Security and Public Safety, OSEMA
- Conference site (responsible person)
- Cognizant organization heads or upper management
- Conference staff

All requests for a foreign national to attend an LaRC conference must be approved. If the visitor is from a designated country, then approval must be obtained from NASA Headquarters, Code IR. The foreign national must apply to his or her Embassy in the United States to attend. The Embassy in turn will forward the application to NASA Headquarters, Code IR, requesting approval. Requests for approval for visitors from non-designated countries can be submitted to LaRC's Deputy Director. To find out whether a country is designated or non-designated, call the Office of Security and Public Safety, 43423.

Priority Action

Upon receipt of official conference approval or disapproval, immediately notify the Conference Manager and OCIO, Media Services Center. If holding reservations have been made as to conference site and motel/hotel block accommodations, take immediate steps to confirm or rescind.

Continue to Next Section

Chapter 3

PHASE II--CONFERENCE ORGANIZATION

SUMMARY

Phase II covers the period of time from receipt of conference approval (end of Phase I) to a few days immediately prior to the conference. In Phase II the conference staff will be fully established and the preliminary planning initiated in Phase I expanded and finalized. The three basic areas of effort--Technical Organization, Administrative and Logistic Support, and Documentation--and a fourth area, Security and International Protocol for Visitors, must be considered.

TECHNICAL ORGANIZATION

Technical organization includes all aspects of the conference technical planning and program execution with which the conference organizer must be concerned **prior** to the **conference**. The nontechnical areas of conference support are highly interrelated and require careful coordination during all phases of technical planning.

Organization of Staff

- The designation of conference chairperson is an important decision governing the success of the conference. Candidates should have the following qualifications:

  - Conference planning experience
  - Technical ability in the field
  - Access to supporting resources
  - Availability to serve (typically as long as 1 year)
  - Enthusiasm for assignment

- If these necessary qualities are not found in a single person, consider an organization with multiple leadership (for example, general chairperson, technical cochairperson, administrative chairperson, and so forth) whose capabilities are complementary.

- For major conferences, a team approach to conference leadership may be advantageous. Peak work loads can be handled more effectively and there is protection against the loss of key personnel. Further, a cadre of conference-experienced personnel capable of organizing future conferences will be created.

- The assignment of conference leaders and key support personnel should be approved by the cognizant organization head. This will establish the official nature of the new assignments as well as the priority of the conference relative to other conflicting duties.

General Planning

Preliminary Meetings

- **With OCIO, Media Services Center**

OCIO, Media Services Center in-house work load (graphics, printing, and so forth) can affect conference technical planning. The impact must be assessed early in Phase II. OCIO, Media Services Center can provide the following:

  - Experience with similar conferences
  - Recommended lead times for OCIO, Media Services Center, elements of conference support

- **With Conference Manager**

  - Experience with similar conferences
  - Recommended lead times for OPS elements of conference support
  - Support obtained through the Public Services Program Contract

Conference

If a joint meeting is planned, the respective roles and responsibilities of the sponsoring organizations should be clarified and documented in a Memorandum of Understanding (MOU). This memorandum can range in scope from a general agreement between organizations at the highest administrative levels to a checklist assigning individual tasks of specific nature. The contents of the Conference Handbook provide a detailed outline of the four phases of conference planning. This can be used as a guide for identifying areas requiring coordination and assigning individual tasks. Publication of the conference proceedings requires special attention to clarify responsibilities as to format, editing, quality control, printing, mailing lists, funding, and so forth.

Conference Session Format

- The technical sessions and their subject areas should be identified and a preliminary conference agenda prepared. **Simultaneous sessions** are **discouraged** at NASA-sponsored conferences.

- To best meet conference objectives, the planners may employ a spectrum of session formats. A one-session seminar may focus on a basic problem area; a work-shop may evolve a recommended program of research or plan of action; or a **forum** with audience participation may provide an informed assessment of conference recommendations. Identify the general need for displays, demonstrations, and tours. (See Phase II.)

Type of Solicitation of Papers

There are two basic types of papers:

- **Contributed**--abstracts freely submitted in response to a general call for papers with decisions later as to acceptance.

- **Invited**--papers specifically invited; topic and author specified by the technical coordinator.

A conference based entirely upon submittal of “contributed” papers does so at a potential sacrifice in breadth and unity of conference content. Exclusive use of “invited” papers, however, carries with it a responsibility on the part of the technical coordinator that the integrated content of the invited papers represents an unbiased and knowledgeable treatment of the subject. A judicious combination of “contributed” and “invited” papers is usually most effective.

Key Session Personnel

Early identification of key session personnel is mandatory, especially if they are to participate in the conference organization and planning. These include the following:

- Session chairpersons
- Keynote or overview/theme speaker
- Forum/roundtable moderator(s)
- Dinner/banquet speaker (if required)

Security Classification of Conference or Conference Sessions

Technology related to national security may necessitate a classified conference (or session). (See Phase II for detailed procedures to be followed.) Early determination of security classification and resulting requirements is mandatory for conference planning. Cosponsored conferences pose additional security problems. Conference security matters, personnel security clearances, site security, and procedures will be carefully delineated and assigned in close coordination with and approval of the Office of Security and Public Safety, OSEMA.

Execution of Technical Plan

Conference Planning Schedule

The development of an effective conference planning schedule requires the following:

- Early identification of planning milestones appropriate to the conference.

- Schedule of events that will be acceptable to the conference organizer and the participants.

Key milestones and recommended lead times for a series of conference types ranging from a general conference (15 months) to a small miniworkshop (3 months) are given in Appendix A, “Typical Conference Lead Times.”

Alert of Key NASA Personnel

Key NASA executive personnel (at LaRC and other NASA Centers) should be alerted by letter as early as possible to the forthcoming conference. The letter should include the conference dates, technical sessions areas, schedule for solicitation of papers, and the LaRC point of contact. Appropriate NASA Headquarters program offices should be alerted.

Call for Papers

This is an important document. If an "Invitation to Conference" (explained in this Chapter) is to follow later, information such as program agenda, conference telephone number, and details on spouses' tour can be held in abeyance until that time. The "Call for Papers" should contain:

- Purpose of conference (including background)
- Date and location
- Outline of technical sessions/conference agenda
- Abstract--content and submittal deadline
- Restrictions as to who may attend (for example, United States citizens only)
- Conference preregistration card (LaRC should promptly acknowledge receipt of this card)
- Security clearance forms (if required)
- Motel/hotel reservation information noting room rate and cut-off date
- Transportation arrangements (if any)
- Local information: area maps, points of interest
- Conference telephone and fax (facsimile) numbers, message board, and so forth
- Name and telephone number of LaRC point of contact
- List of special events (for example, tour for spouses) noting time and place of initial meeting

Examples of "Call for Papers" are in the Conference Manager's Kit. (See Appendix G.)

Mailing Lists (author solicitation)

If the cosponsor publishes a regular journal, an announcement should be published therein (for example, Astronautics and Aeronautics). Mailing lists for previous conferences related in topic are most useful. A current American Institute for Aeronautics and Astronautics (AIAA) roster is invaluable for up-to-date addresses and telephone numbers.

- NASA (Headquarters plus cognizant Centers)
- NASA Advisory Councils, Committees and Subcommittees (check Executive Secretaries for conference interest)
- Specific invitees of known interest
- Technical societies' membership (AIAA, SAE, AAS, and so forth, membership rosters)
- Industry (local aerospace representatives can provide focused listings)
- Congressional Staff Directory
- Military Services (contact Air Force Liaison Office)
- Universities (see George Washington University Office at LaRC for guidance)

In the final analysis, the development of an effective author solicitation list must rely heavily on the professional contacts of the conference organizers.

Review Abstracts

- Technical review panels should be organized well in advance of receipt of the abstracts. Coordinate LaRC panel membership at the cognizant group level. Session chairpersons should be assigned key roles in the review of abstracts. Technical expertise at other Centers can be utilized effectively (for example, Glenn Research Center on propulsion systems).

- Experience has shown many abstracts from outside the Center will arrive late; some that were invited will not arrive at all. The process of technical review must be geared to early identification of gaps in the conference technical content. Immediate steps must be taken to avoid these problems or reorganize the sessions. This is a most critical stage and all resources must be fully utilized. The telephone is the best way to contact the author. Any verbal agreements with potential authors should be promptly verified by letter and a "final" date established for receipt of abstracts.

- Information copies of **accepted** abstracts should be transmitted to the cognizant session chairperson immediately upon receipt at LaRC.

Abstract Acceptance/Rejection Notice

See Appendix G, "Conference Manager's Kit," for a sample of an abstract acceptance/rejection notice.

A letter of acceptance should include:

- Notice of acceptance papers.
- Identification of session and session chairperson.
- Duration of spoken version (based on abstract).
  (**NOTE**: "Written" version can be longer than "spoken.")
- Insight as to allowable number of slides (see Appendix D, "Guidelines for Illustrated Talks").
- Constraints as to references.
- LaRC Manuscript and Figure Preparation Kits.
- Date for receipt at LaRC of "camera-ready" manuscript and slides.
- Address to which manuscripts are to be sent.
- Date of rehearsal (if any) and location.
- Enclosure of preliminary conference schedule.
- Request for a 150-word biography for the session chairperson's information.

NOTE: Acceptance of a paper for presentation by a *foreign national* necessitates special handling in regard to protocol and security. NASA Headquarters, Code IR, is to approve clearance to attend the conference where attendance is by invitation or otherwise restricted in any way, before an acceptance letter is mailed. (Details are set forth in this Chapter.)

A letter of rejection should include the following and be mailed promptly:

- Reasons for rejection.
- Invitation to attend the conference.

"Early Alert" Notification Card

For major conferences where long lead times are required, an "Early Alert" notification card mailed 4 to 6months prior to the conference can be helpful to potential attendees in arranging their personal schedules.

The “Early Alert” mailing lists represent the initial conference invitational list. Make sure recipients of the "Early Alert" notification card receive an invitation to attend the conference.

The **invitation** should contain any information that was not in the "Call for Papers." A letter to individuals can be sent or an announcement made in a technical journal. Examples are given in the Conference Kit. (See Appendix G.)

The **mailing list** should consist of appropriate additions to and subsets of the mailing list used in the “Call for Papers.” For example, the invitation with program agenda might be sent only to those individuals who returned a reply card in a “Call for Papers” brochure. In addition, both might be published in a technical journal and sent to major companies and other NASA Centers for distribution to bulletin boards.

Review of “Camera-Ready" Papers at LaRC

- Have the technical coordinator perform a quick scan of the papers noting conformance with abstract and specified length.
- Send copy to the session chairperson.

General Note

At this phase of the conference organization, only one-half to three-fourths of the papers may have been received. Institute an immediate telephone followup. Advise that the final date is 3 weeks before the conference for the inclusion of slides in a conference preprint.

Rehearsals for Conference Speakers

LaRC speakers usually rehearse well in advance of the conference. Rehearsal of non-LaRC speakers is at the discretion of the conference chairperson. Schedules for rehearsal are constrained by the necessity for incorporating any slide revisions into the conference preprints. The following suggestions should improve the effectiveness of the rehearsals:

- Start 1 month before date.
- Rehearse at conference site (if practical).
- Establish small panels (typically three persons) to handle all reviews in a given
- Have at least one person review **ALL** presentations prior to the conference to preclude unexpected problems. (This pertains to non-LaRC as well as LaRC papers.)

Conference Slide Preprints (when required)

Copies of preprints ready for printing should be given to OCIO, Media Services Center, at least 3 weeks before the conference. A few late papers can be accommodated up to about 7 days prior to the conference. The slide preprint volume requires the development of the following:

- Cover
- Contents

- Conference agenda
- Original or photographic copies of slides ready for printing

Displays and Tours

The content and enjoyment of a technical conference can be enhanced greatly by the inclusion of carefully selected displays and tours. These should be pertinent, instructive, and interesting. Care should be taken to preclude any hint of commercialism in the displays.

For major conferences, a special coordinator should be designated to plan and execute the displays and tours programs. Substantial support from technical personnel will be required for the displays and to conduct the tours.

ADMINISTRATIVE AND LOGISTIC SUPPORT

In Phase II of the conference organization, preliminary decisions as to date, site location, and motel/hotel accommodations must be finalized and the conference planning expanded. All administrative and logistic support for conferences is provided by organizations listed below. (Appendix E, “Directory of Conference Support Services,” lists service, organization, contact, telephone extension, and mail stop number.)

- Office of External Affairs (OEA)
- OCIO, Media Services Center
- Fabrication Division (FD) [subject to change with LaRC reorganization]
- Office of Logistics Management (OLM)
- Financial Management Division (FMD)
- Office of Procurement (OP)
- Office of Human Resources (OHR)

Motel/Hotel Accommodations

The Conference Manager is responsible for the selection of accommodations appropriate to the conference. The Conference Manager has worked with the majority of motels/hotels in the Tidewater area and through past experience can assist with arranging for block reservations.

The reservation agreement should be confirmed in writing. Most motels/hotels provide self-addressed, stamped reservation cards which can be included in the LaRC conference invitation. Be sure the reservation card includes the conference name, room rate, and reservation cutoff date.

The card should be returned *directly* to the motel/hotel; NASA can only assist in the reservation process. Followup visit to the motel/hotel should be made to preclude problems at conference time.

Conference Site Planning

LaRC On-Site Facilities Coordinated by the Conference Manager

- H. J. E. Reid Conference Center, 14 Langley Boulevard (Facility 1222)
- Executive Conference Center, 3 South Wright Street (Facility 1218)
- 7 x 10 Conference Room, 17 West Taylor Street (Facility 1212, Room 200)
- Pearl I. Young Theater, 5A North Dryden Street (Facility 1202)

Room arrangements and seating are flexible and can be adapted to special needs. The services of the Conference Manager include:

- Planning and assisting in registration.
- Arranging for coffee and refreshments (fee basis).
- Coordinating site logistics, transportation, audio/visual support, motel/hotel reservations, on-site/off-site group dining reservations, and so forth.
- Providing security and maintenance.

The following on-site facilities can be provided by prior arrangement with the Conference Manager:

- Communications center.
- Message-center bulletin board.
- Travel assistance desk staffed by travel clerk.

Other LaRC Conference Sites

The conference staff of the sponsoring organization must assume responsibility for all physical site arrangements with support from the site Facility Coordinator (see the LaRC Telephone Directory). Scheduling of site support services (audio/visual, electronic, transportation, and so forth) must be arranged directly with the responsible support organization. The Conference Manager can be of assistance in coordinating on-site support such as signs, transportation, and so forth.

A site arrangement plan (Appendix G, “Conference Kit”) should be prepared and transmitted to the Facility Coordinator and all supporting organizations.

The Cafeteria Manager can provide coffee and snack service to conference sites other than those sites coordinated by the Conference Manager.

Off-Center Conference Sites

Local (within the area of LaRC logistic support)

Logistic support can be made available from LaRC; however, the following problems occur when using an off-Center (but local) conference site:

- Inadequate communications with off-site management usually in the interpretation of the contract.
- Inexperience of LaRC personnel working with off-site personnel.
- Less assistance for audiovisual details off-site.
- High cost for off-site audiovisual assistance.

NOTE: Through the Conference Manager, contract support assistance can be furnished if organizational funding is provided.

Nonlocal (beyond LaRC logistic support)

Organization of a NASA conference remote to LaRC can present many unanticipated problems. At LaRC a simple problem could be handled by a telephone call, at a remote site the same problem might require a contract extension or a new procurement. There are no petty cash funds available for off-site emergencies.

To provide necessary support services at a conference site remote to LaRC consider:

- Securing an off-site technical cosponsor.
- Arranging a grant with a local college or university.
- Utilizing the NASA Public Services Program Contractor.

Any contractual agreements which result must be handled through formal LaRC procurement channels. (See “Procurement of Contract Support.”)

General Logistics

LaRC Local Transportation

LaRC On-Site

Bus transportation to and from the Cafeteria should be provided in case of inclement weather. Buses may be required for on-site conference tours and trucks for transporting heavy equipment for displays. A NASA vehicle (preferably a station wagon) should be assigned to the conference chairperson for emergency transportation needs.

Off-Site to LaRC

Parking at LaRC is limited. Bus and/or limousine service can be arranged through the Conference Manager to transport attendees to and from the motel/hotel area, to the banquet site, and for off-site tours. When busing requirements fall beyond NASA in-house capacity, commercial transportation can be arranged by the Conference Manager.

Special Signs

The Conference Manager will coordinate all requirements for special signs. The work order should indicate size, color, and number required. Examples of signs:

Administrative/Logistic:

- Directional (road)
- Building site
- Registration
- Travel desk
- Ticket desk

- Checks payable to . . .
- Message center
- Coffee/beverage
- Motel/hotel desk information
- Bus identification

Conference (technical):

- Chairperson's table
- Session titles
- Session chairperson
- Roundtable name cards
- Displays/demonstrations
- Tour signs (on location)

Staffing for Registration and Conference Support

LaRC does not maintain a clerical pool for conference support, security check-in, and other instructions. Therefore, personnel needed for the various conference stations will have to be drawn from:

- Staff of the sponsoring group(s)
- Contract personnel

Registration Planning

An efficient registration plan is important. The registration desk is the first direct contact made by the conferee. The Conference Manager will provide support in registration planning. Extra personnel may be required to handle the workload of registrant identification and security badging. All registration and conference support personnel should wear highly visible name badges.

Preregistration

At the discretion of the conference coordinator, a conference preregistration card (see Appendix G, “Conference Kit”) may be included in the conference Letter of Solicitation of Papers/Invitation to Conference to provide an early assessment of the number of attendees and to permit preparation of badges and registration cards.

NOTE: Preregistration is a requirement for all conferences that are classified by national security policy or those which limit attendance to specific groups of attendees. Advance approval and preregistration is required for foreign national attendees in all circumstances. These aspects of registration will be covered in this Chapter.

On-Site Registration

Small Conferences

Every effort should be made for registration of attendees at the site of the conference. All registrations should be on a suggested attendee registration form. (See Appendix G, “Conference Kit.”) Foreign nationals must register at the Badge and Pass Office, 1

Langley Boulevard (Facility 1228), LaRC, after satisfying NASA and Center requirements for visits by foreign nationals.

Large Conferences

Registration for attendees at large conferences should be at the site of the conference.

- **For NASA LaRC personnel**: Provide a separate registration desk.

- **For non-LaRC conferees (U.S. citizens)**: Normally one registration desk will accommodate 50 to 75 registrants. This depends on the complexity of the registration process (for example, classified conference). Registration is facilitated by alphabetical grouping. First letters of surnames are not distributed uniformly throughout the alphabet. Groupings, for equal distribution, are:

Two Groups	Three Groups	Four Groups
A----L	A----G	A----E
M----Z	H----O	F----K
	P----Z	L----R
		S----Z

Refreshment Fee

Many NASA conferences charge a nominal refreshment fee to cover miscellaneous "out-of-pocket" expenses for coffee, pastries, and services available to the attendees. **There are no Center funds available for food and beverage service.**

Fees may be apportioned for late registrants. Costs of dinners/banquets, socials, and transportation should be defrayed by purchase of special tickets.

Conferee Information Packet

At the discretion of the conference coordinator (with support from the Conference Manager), an information packet in special covers may be made available to registrants. Items can include:

- Preprint of conference slides.
- Key technical references.
- Conference agenda and schedule.
- Preliminary roster of attendees.
- Area map (including banquet location and tour sites).
- NASA information releases of current interest.
- Brochures on local areas of interest.

Money Manager

Procedures are to be established for handling registration fees, luncheon/banquet tickets, tour charges, and other expenses. For a large conference, this can result in the accumulation of several thousand dollars. Call the Conference Manager, extension 46362, regarding money matters. All registration fees which are collected should be deposited in the NASA Langley Conference Center account. All transactions should be handled by a check whenever possible. During registration, assign a cashier to a special desk to handle all monetary transactions. Receipts to registrants are to be issued upon request. Forms that are filled out in advance, except for validating signature, will save time. Guidance by the Conference Manager can be helpful in this area.

There is a LaRC policy which states that all attendees must be assessed a registration fee to cover food and beverage costs of a conference. If there are any residual funds left over after the bills have been paid, the funds will be used to help maintain and operate the four primary conference facilities -- the Reid Conference Center, Pearl Young Theater, the Executive Conference Center, and Room 200 in the 7 X 10 Facility. Funds from one conference cannot be held over for future conferences.

Displays and Tours

The OPS can assist in the logistic support of displays and tours as listed below by coordinating all transportation arrangements, training personnel as bus guides, providing special signs, and so forth.

Displays

- Equipment transportation
- Display tables and signs
- Electrical power
- Safety and security
- Availability of knowledgeable attendants

Tours

- Bus transportation and schedules
- Traffic flow
- Weather

The basic plan must consider inclement weather as well as good weather. At least one guide should be provided for each bus. Consider a practice run to acquaint all tour personnel with their duties.

Food and Beverage

For planning purposes, food and beverage support is divided into three areas: coffee and snacks, luncheon, and social events. No Center funds are available for food and beverage service; therefore, all expenditures must be recoverable.

Refreshments

For those conference sites coordinated by the Conference Manager (see page 3-9), the procurement of food and beverages will be handled by the Conference Manager. Reimbursements for expenditures can be covered by a refreshment fee or by cash collection using an honor system. The fee approach is preferable. Expenses incurred for coffee and snacks on site are payable to the Conference Manager upon receipt of the bill.

Luncheon

The Cafeteria is the preferred facility for lunch. For small groups (less than 75), the Private Dining Room at the Cafeteria is reserved by the Cafeteria Manager.

Because of the crowded conditions in the Cafeteria between 11:30 a.m. and 12:30 p.m., all conferences and meetings held in the H.J.E. Reid Conference Center, the Executive Conference Center, the 7 x 10 Conference Room, and the Pearl I. Young Theater should not schedule lunch before 12:30 p.m.

Social Events

Social activities can be arranged at either on-Center or off-Center locations. The facilities of the host motel/hotel are to be considered for off-Center needs. The Conference Manager can coordinate all on-site as well as off-site social events. However, reimbursement of expenses should be by advance sale of tickets.

Dinner/Banquet

General

Dinner/banquets are planned primarily for the enjoyment and relaxation of out-of-town guests. A well-planned social event can provide an opportunity for conference attendees to meet informally with LaRC staff members, to renew acquaintances, and to assess the progress of the conference.

The Conference Manager has working arrangements with numerous establishments in the Tidewater area and can assist with arrangements for any group size on or off Center. For large groups (100 or more), a reservation should be made several months in advance to assure the widest choice of locations. Dinner/banquet arrangements are usually best attended if held on the evening of the **first** day of the conference. Experience has shown that guests are often concerned more with the quality of the food and beverage than with the cost.

A large social event necessitates a great deal of advance planning because the exact number of attendees cannot be predicted in advance. Consideration should be given to assigning one person on the conference staff to assume responsibility for organizing and executing all aspects of the social events (utilizing the resources of the Conference Manager). This would relieve the conference leaders of administrative tasks associated with the conference.

Guarantee of Reservations

Dining establishments usually require an advance guarantee of the number of meals to be served 24 to 48 hours in advance. Some permit a 5-percent change as late as 10:00 a.m. on the day of the dinner. The conference chairperson becomes personally responsible for meeting this guaranteed minimum regardless of the number served.

To reduce the possibility of a financial loss, consider the following alternatives:

- In the conference invitation, request that dinner reservations be made and **paid for in advance**; however, this could result in reduced attendance.

- Sell tickets on the morning of the dinner and rely on last-minute negotiations to reconcile the actual number with that guaranteed. It would be wise to consider **flexibility in guarantee** when selecting the dining establishment.

Ticket Pricing

The price of an individual dinner ticket must include the following additional expenses (if incurred):

- Gratuities
- Local sales and food taxes
- Table decorations
- Transportation
- Tickets for speaker and companion
- Entertainment
- Projection/photographer (may or may not be NASA employee)
- Open bar (if "cash" bar not used)

Logistics (Transportation)

Bus transportation can be provided for the convenience of the guests, especially if the dining location is difficult to find. Plan to have an experienced guide on each bus. For those who wish to travel in their own automobiles, the Conference Manager can provide local area maps.

Program Arrangements

If there is to be a dinner speaker and a ceremony, an appropriate program must be planned. Consider the following:

- Master of Ceremonies
- Head table and place cards (notify in advance all guests who are to be seated at the head table)
- Speaker support
    - Podium (with light?)
    - Audio/visual aids
    - Entertainment (?)

Media Support (OPS, Office of Public Affairs)

The Office of Public Affairs can coordinate media support for all conferences and meetings, as appropriate. This includes interviews, press conferences, TV coverage, and so forth. Preparation of specific release material in preliminary form is the responsibility of the conference chairperson. Releases are to be in the Office of Public Affairs at least 2 weeks (preferably 4 weeks) prior to the conference to permit reviewing, editing, coordinating, duplicating, and distribution and subsequent processing by the appropriate publicist.

Miscellaneous Planning

Dignitaries and VIP's

Notify the OPS, who in turn will notify the Office of the Director of any dignitaries or very important persons (VIP's) who plan to attend the conference.

Air Force/Navy/Army Attendees

The Air Force Liaison Office is to be informed when U.S. Air Force personnel attend a conference. The Liaison Office can assist in providing quarters, transportation, and general support. No similar support offices exist at LaRC for U.S. Navy personnel. The U.S. Army has a field office at LaRC (that is, the U.S. Army Vehicle Technology Center, ARL) and should be informed of Army attendees.

Spouses' Program Committee

For large conferences (especially during the tourist season), special programs for spouses of the attendees should be considered. Spouses of the LaRC conference organizers, with support of the OPS, can best provide program leadership. This program should be included in the conference invitation noting time and place of the initial meeting and requesting a response as to planned participation.

Graphics and Printing Support

General

All conference graphics and printing (except special signs) must be coordinated through OCIO, Media Services Center. Appendix A, "Typical Conference Lead Times," lists the occurrence of key events relative to the date of the conference. Supporting graphics and printing must be initiated at least 3 weeks in advance of the dates noted to allow for working time within OCIO, Media Services Center.

The following key conference events require graphics and printing support from OCIO, Media Services Center:

- Call for Papers
- Notification Card - Early Alert
- Letter - Acceptance/rejection of paper
- Invitation to conference (letter or announcement)
    - Conference agenda
    - Preregistration card/form
    - LaRC map
- Preprints of conference slides (cover, contents, agenda)
- Conference support items
    - Attendee registration form
    - Conference identification badges
    - Dinner/social or banquet tickets
    - Place cards (head table)
    - Area maps (special)
    - Technical/information handouts

Dinner/Social or Banquet Tickets

Distribution of these valuable tickets should be carefully controlled. Number the tickets serially and record the distribution. Print an excess of tickets if sale is to be made at several remote sites. Set a definite cutoff time beyond which no more ticket sales can be made and publicize this cutoff time.

Audio, Video, Audio/Visual, and Teleconferencing Support

Conference Projection Support (OSPS)

H.J.E. Reid Conference Center, 14 Langley Boulevard (Facility 1222)

Through coordination with the Conference Manager, a projectionist is provided for conferences held in the H.J.E. Reid Conference Center. The H.J.E. Reid auditorium has triple rear-screen projection for viewgraphs and 35 mm slides. Movies (16 mm with sound) and videotapes can also be shown. Please note that all viewgraphs and slides must be in a **horizontal** format. The Conference Kit (Appendix G) contains a typical cue sheet for multiscreen projection. At least 3 weeks prior to the conference, the Conference Manager is to be given a conference agenda (with detailed time schedule "marked up" for benefit of projectionist) and known audio/visual support requirements.

7 x 10 Conference Room, 17 West Taylor Street (Facility 1212, Room 200)

The Conference Manager can provide a projectionist for this conference room if the projectionist has not been assigned to a conference being held at the H.J.E. Reid Conference Center.

Executive Conference Center, 3 South Wright Street (Facility 1218)

The Conference Manager can provide portable equipment/ screens for the Executive Conference Center.

Pearl I. Young Theater, 5A North Dryden Street (Facility 1202)

The Conference Manager can provide a projectionist for the theater if the projectionist has not been assigned to a conference being held at the H.J.E. Reid Conference Center.

Projectionist support is not provided to other on-site meeting locations except as noted in paragraph below.

Projectionist support to other functions, on and off Center, can be provided through the use of the OPS Conference Support Contractor with proper funding by the organization holding the conference. Assistance/guidance for this support can be provided by the Conference Manager.

Audio/Visual Support

Podiums, public address (PA) systems, microphones, video playback equipment (that is, monitors, VCR's, and so forth):

- H.J.E. Reid Conference Center, 7 x 10 Conference Room, Executive Conference Center, and Pearl I. Young Theater: Coordinated through the Conference Manager (OPS).
- Other sites (on and off Center): Coordinated through the OCIO, Media Services Center.

Audio/Video Recording

- H.J.E. Reid Conference Center, 7 x 10 Conference Room Executive Conference Center, and Pearl I. Young Theater: Coordinated through the Conference Manager (OPS).
- Other sites (on or off Center)--Audio and/or video recording: Coordinated through OCIO, Media Services Center.

Teleconferencing

Teleconferencing in the H.J.E. Reid Conference Center is coordinated through the Conference Manager, extension 46362.

Procurement of Contract Support

Contract Support

LaRC support services are usually adequate to handle most in-house conferences; however, special needs may require support by the NASA LaRC Support Contractor.

The Conference Manager has experience and can coordinate the contract procurement of routine conference support such as registration assistance, stenographic help, rental of duplicating equipment, and sessions at a site remote to LaRC.

However, there is a wide spectrum of contract support ranging from the elementary services noted to the procurement of a “turn key” conference including such items as host accommodations, conference organizational responsibility, and conduct of sessions which are not held at LaRC.

The “turn key” conference is not normally used; however, contract support at a more modest level may be dictated by several in-house constraints such as:

- Limited LaRC personnel, technical expertise, or resources to plan and conduct the conference.
- Unique conference requirements for extended work hours, transcription capabilities, or other support services more economically provided under contract.
- The need for a remote conference site.

DOCUMENTATION

Publications Plan

Publication of the conference proceedings should be considered early in the conference planning cycle (Phase I) to assure orderly scheduling within OCIO, Media Services Center, and in other support areas. The OCIO, Media Services Center, will require the following information to develop a viable publications plan:

- Sponsor/cosponsor agreements
- Publication security
- Restricted category if applicable
- Supplemental report distribution requirements
- Target mailing date

The conference chairperson is responsible for preparing the completed print-ready manuscript and supplying it to the OCIO, Media Services Center, for printing.

Editorial Instructions to the Author

Include in the "Letter of Acceptance" (see Appendix G "Conference Kit"), a Manuscript and Figure Preparation Kit (available from the OCIO, Media Services Center) containing:

- Notes on preparation of manuscripts (plus examples)
- Notes on figure preparation (plus examples)
- Slide preparation forms (note horizontal slide format only)
- Supply of approved typing stock (paper)

Printing

After the author's "camera-ready" copy is approved by the technical chairperson, it should be transmitted to OCIO, Media Services Center, for printing. Include the business telephone number and address of the author for possible direct contact.

NASA Langley Form 99

NASA Langley Form 99, "Technical Publication Approval Form," is to be initiated by the conference chairperson or editorial coordinator and routed through channels. This is a requirement for all LaRC publications. **Individual conference authors need not submit this form.**

SECURITY AND INTERNATIONAL PROTOCOL FOR VISITORS

Less than 5 percent of LaRC conferences address classified national security information; a somewhat larger percentage will limit attendance to particularly restrictive groups of attendees (U.S. citizens, Government employees, persons with "need-to-know," and so forth). For either category, special procedures must be followed during the early planning phase, the conduct of the conference, and the distribution of the proceedings.

At LaRC, the Office of Security and Public Safety, OSEMA, has the sole responsibility for:

- Determining the security classification of a conference,
- Enforcing applicable security regulations,
- Processing personnel security clearances,
- Processing visit requests to LaRC, and
- Providing on-site security.

This Branch must be contacted in the early planning stages to coordinate conference plans and schedules.

No attempt will be made to detail security regulations and international protocol. (See NHB 1620.3, "NASA Security Handbook.") The following highlights of possible security and protocol issues should be helpful.

General Information

- Security becomes a special issue when LaRC cosponsors a classified conference. A Memorandum of Understanding should be prepared clarifying security procedures and responsibilities and be approved by the LaRC Security Officer.

- The invitation to attend the conference must clearly state the level of security clearance requirements and provide necessary clearance forms.

- The following two types of security services are provided by the Office of Security and Public Safety, OSEMA:

  - Clearance to attend the conference
  - Clearance to receive classified material at an approved institutional mailing address

NOTE: The Air Force Liaison Office should be utilized to assist in verifying security clearances for U.S. Air Force personnel.

On-Site Planning Considerations

- Ensure that **all support personnel** possess the appropriate personnel security clearance.

- Prepare identification badges prior to the conference according to an access list certified by the Office of Security and Public Safety, OSEMA.

- Provide security receipts and a secure area for overnight storage of badges and classified material.

- A receipt must be obtained when classified material is distributed by NASA to attendees. The material must be retrieved at the end of the conference. Classified material for permanent retention will be forwarded by NASA, by mail, to a security-approved institutional address.

Foreign Nationals and International Conferences

- A foreign national or other non-U.S. citizen who is employed by a U.S. firm in its U.S. operations can be authorized to attend a restricted conference with **prior approval** of the LaRC FEDD Officer (Commercialization Office) providing the attendee’s visit has been approved in accordance with NASA and Center policy.

- For specific details and procedures regarding foreign national participation in NASA-sponsored or cosponsored conferences, contact the Office of Security and Public Safety, OSEMA.

- Attendance at a classified conference (whether by a U.S. citizen or non-U.S. citizen) is limited to those who possess the necessary level of security clearance and can be certified as to having a “need-to-know.”

- As noted in the “Letter of Request for Conference and Approval,” requests by a foreign national to attend an LaRC conference, regardless of its classification, must be approved in writing by NASA Headquarters, Code IR. To attend, the foreign national must first make application to his or her Embassy in the U.S. The Embassy in turn will forward the application to NASA Headquarters, Code IR, requesting approval. Since international visit clearances require considerable time for approval, the process should be initiated as soon as possible.

Chapter 4

PHASE III--CONDUCT OF CONFERENCE

> *McGurk's Law*
> *"Any improbable event which would*
> *create maximum confusion*
> *if it should occur . . . will."*

GENERAL

The conduct of a conference will determine its overall success. Therefore, it is important that preliminary planning, as outlined in this handbook, be followed.

TECHNICAL ORGANIZATION

The following section details the responsibilities and duties of the general chairperson and session chairpersons which will assist in anticipating all conference requirements and handling unforeseen events or emergencies.

General Chairperson

Responsibilities and General Duties

- Brief the session chairpersons before the conference.
- Provide a detailed time schedule for each session chairperson, the projectionists, audio/visual recorder, and, if appropriate, the LaRC Conference Manager.
- Identify and convey to the conferees the overall conference objectives (desire for audience participation, and so forth).
- Introduce the keynote and theme speakers.
- Introduce the session chairpersons.
- Make all necessary administrative/logistics general announcements.
- Control the conference schedule.
- Assess the audience reactions.
- Present the conference recap at the close of the conference.
- Assure the well-being of the attending dignitaries.
- Provide the focal point for news media.
- Oversee all aspects of the conference (technical, administrative, and security).

Session Chairperson

Responsibilities and General Duties

- Brief the speakers before the session.
- Coordinate the speakers and their audio/visual support. Assist in preparation of cue sheet(s) for multiscreen projection (see Appendix G, "Conference Kit").
- Introduce the session speakers.
- Control the session schedule.
- Emcee the discussion period.

- Provide a technical recap at the close of the session.
- Turn the meeting back to the general chairperson.
- Oversee all aspects of the session.

Session Control and Support

Maintenance of Schedule

Speakers often exceed their allotted time. When necessary, the session chairperson may signal the speaker or orally request that the presentation be concluded (that is within 1 minute). The audience should be informed that the *written version* will contain the full text and figures. It is suggested, however, that the question and answer period be retained even though it may be brief.

Promoting Audience Participation

It is the session chairperson's responsibility to create an atmosphere conducive to audience participation. The audience should be encouraged to ask questions. If there are none, the session chairperson should offer a provocative question as an example.

Support of the Speaker

The session chairperson should repeat the question for the benefit of the audience. If the speaker has difficulty in responding to a question, the session chairperson should consider the following:

- Offer a clarifying statement.
- Call upon a senior staff member or a recognized authority in the audience to respond.
- Intercept unrelated questions. Where possible, respond by noting that the subject will be covered in a succeeding presentation.
- In a major controversy, terminate the discussion at an appropriate moment. Establish a time and place where interested parties (including the speaker and chairperson) can discuss the subject at greater length.

ADMINISTRATIVE AND LOGISTIC SUPPORT

Administrative and logistic support staff individuals are to be assigned to check conference site preparations and to initiate activities to ensure that the conference is conducted efficiently.

General Survey

- Motel-to-LaRC bus transportation
- Availability of staff on site
- Registration area (signs, traffic flow, and so forth)
- Audio/visual support
- Possible safety hazards

Registration Logistics

Desk Area

- Identifying signs
- Badges in trays alphabetically
- Registration "sign-in" sheets (request that attendees furnish complete mailing address). (See Appendix G, "Conference Kit.")
- Handout packets available

Cashier Facilities

- Container for registration fees
- Tickets for dinner/banquet and other events
- Change ($$) on hand
- Sign noting "Make checks payable to _____"
- Receipts on hand

Conference Support Facilities

- Coffee/snack table
- Hospitality desk
- Message/communications center
- Travel assistance desk
- Luggage storage
- Coat racks

Dinner/Banquet

Conference Site Activities

- Publicize ticket sales from conference podium noting cutoff time.
- Notify dinner/banquet site as to final count of guests.
- Furnish maps locating site (when off Center).
- Provide transportation as required for dinner speaker and guests.

Dinner/Banquet Site

- Perform predinner chores:

    - Check head table place cards
    - Arrange floral decorations
    - Check seating arrangement
    - Provide podium with light and water
    - Check audio/visual equipment

- Establish contact with head waiter.

    - Validate number of place settings versus guaranteed total.
    - Arrange for payment of check.

NOTE: Prior arrangements should be made to avoid complete payment (sometimes four figures) at the dinner unless enough dinner prepayments or registration fees will have cleared to provide sufficient funds in the conference account.

- Check presence of following key persons:
  - Master of ceremonies
  - Guest speaker and head table guests
  - Photographer
  - Projectionist

- Have dinner site sufficiently staffed **before initial arrival** of guests.

Media Support at Conference Site

- Execute established news media plan (approved by the Office of Public Affairs).
- Refer unplanned media requests to the general chairperson and the Office of Public Services.
- Support the media photographer (identify key guests, and so forth).

Close of Conference

- Provide assistance in baggage retrieval.
- Assist with change of travel plans.
- Announce schedules of airport limousines.
- Arrange carpools for off-site transportation whenever possible.
- Lock up all valuable or fragile displays not yet claimed and notify owners.

SECURITY FOR CLASSIFIED CONFERENCE

During Conference

- Registrants must have a valid photo identification to receive preregistered identification badges.
- Recipients must sign for receipt of any classified material.
- Security support services officers control access to classified sessions.
- Conference badges and classified material must be returned at the end of each day and stored in a security-approved container.
- Attendees must reregister each morning of classified sessions.

Close of Conference

All conferees must turn in identification badges and all classified material received during the conference. The classified material turned in will be transmitted to the recipient **by mail** to a **security-approved mailing address**.

Chapter 5

PHASE IV--POST CONFERENCE

> *"Put it before them briefly so they will read it clearly so they will appreciate it, picturesquely so they will remember it and, above all, accurately so they will be guided by its light."*
>
> *Joseph Pulitzer*

GENERAL

It is important that a permanent record of the conference proceedings be retained. The following describes how this is to be accomplished.

TECHNICAL ORGANIZATION

Meeting with the OCIO, Media Services Center

Immediately after the conference, the general chairperson should initiate a meeting with the OCIO, Media Services Center, to facilitate documentation. Documentation items to be considered include:

- Post-conference status of **all** conference papers (a plan of action--paper by paper to close out all outstanding items).
- Organization and layout of the publication (cover, preface, contents, number of volumes, and so forth).
- Special printing constraints.
- Schedule of events.
- Target mailing date.
- Supplemental distribution requirements.

Supplemental Mailing List

Prepare a supplemental mailing list, including the list of conference attendees and:

- List of initial conference invitees.
- LaRC staff members with expertise in area.
- NASA Headquarters and other NASA Centers.
- NASA Advisory Councils, Committees, and so forth.
- Other Government agencies.
- Industry.
- Department of Defense.
- Universities.
- Technical societies.
- The media.

When the mailing list has been established, **pressure sensitive labels** are to be transmitted to OCIO, Media Services Center, by the conference staff. A master mailing list should be included in the conference files. (See "Storage of Conference Records" section in this Chapter.)

Post-Conference Correspondence

Additional post-conference correspondence may include:

- Technical queries from attendees.
- Requests for copies of conference proceedings and reference reports.
- Conference assessment by attendees.

ADMINISTRATIVE AND LOGISTIC SUPPORT

Acknowledgment Letters

Send letters to:

- Keynote and banquet speakers, roundtable moderators, and so forth.
- Session chairpersons.
- Key conference staff and support members.

Close of Conference Housekeeping

- Remove signs; return furniture and equipment.
- Dismantle and return displays.
- Pay all bills and close out finances.

Amenities

- Mail publicity photographs to appropriate recipients.
- Transmit letters of commendation recognizing meritorious performance as appropriate.

DOCUMENTATION

OCIO, Media Services Center, will assist with the figure preparation of “print-ready” copy, printing, and mailing of conference proceedings. The following schedule for publication of proceedings is typical of a 3-day, 40-paper conference (all papers turned in at the close of the conference):

Item	Days
Delay in receiving last paper	7-14
Review of “print-ready” copy	14-21
Printing and binding (under contract)	56
Mailing of proceedings	5
Total	94-106

The minimum time from the end of the conference to completion of the mailing is approximately 100 days. However, it is extremely difficult to hold to this minimum time because of unanticipated delays. Close liaison must be maintained between the conference staff and OCIO, Media Services Center.

INTEROFFICE LETTER OF CONFERENCE ASSESSMENT

An interoffice letter of conference assessment is to be prepared by the conference chairperson within 3 months of the date of the conference and submitted through organizational channels to the Senior Scientist, Office of the Director. Suggested items of assessment are:

Conference Statistics and Analysis

- Number of registrations (LaRC; non-LaRC)
- Conference agenda (attach to the letter)
- Copy of Conference Proceedings (or the Conference Proceedings number)

Technical Assessment

- Attainment of conference objectives
- Effectiveness of presentations
- Audience participation
- Technical feedback from conferees

Administrative and Logistic Support Assessment

- Summary statement
- Conference site accommodations
- Registration process
- Audio/visual support
- Refreshments and lunch
- Tours and social events (where and how attended)
- Motel accommodations and adequacy of support

Documentation Assessment

- Maintenance of publication schedule
- Effectiveness of support from OCIO, Media Services Center staff
- Contractor performance (if provided)

General Recommendations

- Overall assessment of conference
- Recommendation as to need for a follow-on conference (when and where)

Conference Files

State where the records of the conference will be filed and who will be the contact for retrieval.

STORAGE OF CONFERENCE RECORDS

Conference records are to be retained for 5 years in the office of the LaRC conference chairperson. Include material which will assist in planning similar conferences; that is:

- List of conference staff members
- Key planning events and dates
- Conference agenda and schedule (as executed)
- Copies of all form letters and material sent to conferees, authors, and so forth, including:

    - Call for Papers
    - “Early Alert” notification cards
    - Invitation to conference

- All mailing lists (including that for Conference Proceedings)
- Significant correspondence
- Master copies of registration “sign-in” sheets
- Administrative and logistic support items including:

    - Information packet distributed to conferees
    - File on social events
    - Financial report, job orders, and so forth
    - Publicity

- Interoffice letter of conference assessment
- Conference slide preprints (one copy)
- Conference Proceedings (three copies)
- Audio/video recordings

STORAGE OF CONFERENCE CLASSIFIED RECORDS

Classified conference records are to be retained in the Special Documents area of the LaRC Technical Library.

Continue to Next Section